

**BA Contacts Overview**

This Job Aid provides an overview of the Benefits Administration Contacts page and provides guidance on how to update contact information.

This Job Aid does not apply to members of the Local Choice Program. If you are a part of the Local Choice Program, please see the Job Aid titled **BN361 TLC Data Sheet Locality** located on the Cardinal website under **Learning**.

**Table of Contents**

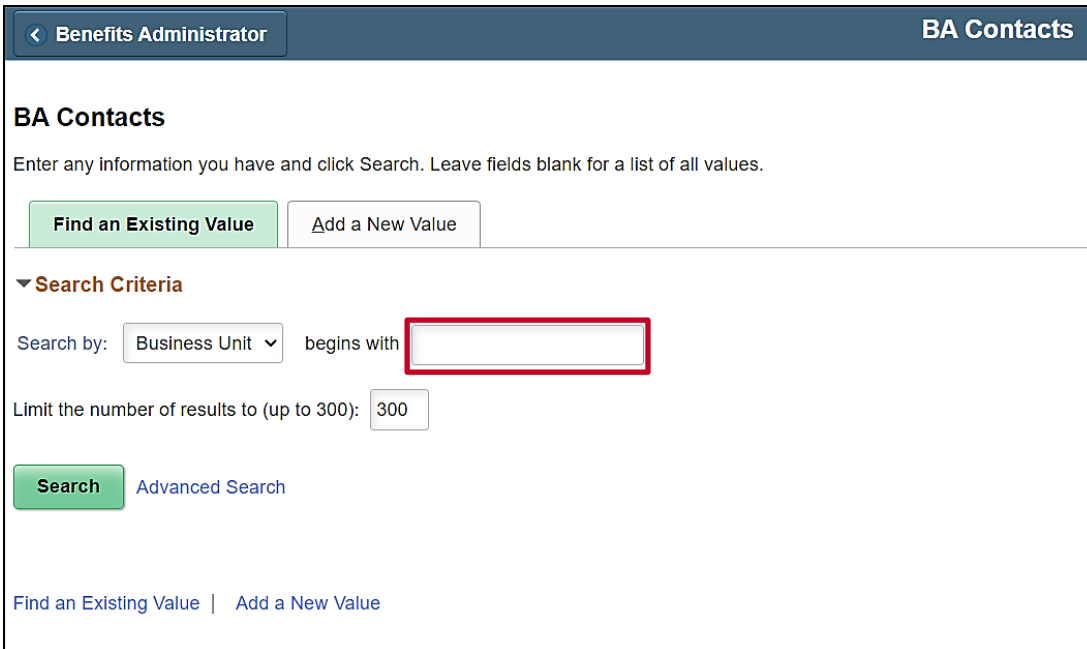
BA Contacts page .....	2
------------------------	---

**BA Contacts page**

1. To update the Benefit Administrator's contact information, navigate to the **BA Contacts** page by following this path:

**Navigator > Benefits > Employer Information > BA Contacts**

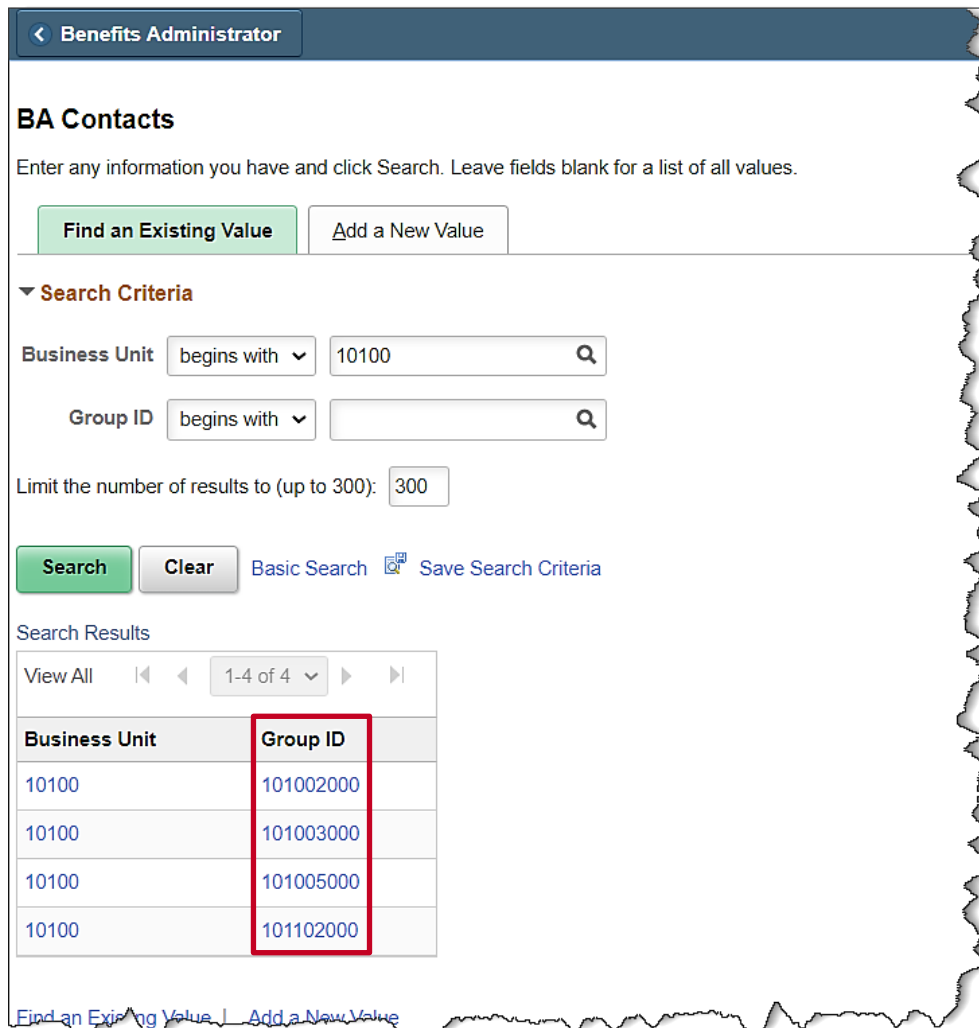
The **BA Contacts Search** page displays.



The screenshot shows the 'BA Contacts' search interface. At the top, there is a navigation bar with a back arrow and 'Benefits Administrator' on the left, and 'BA Contacts' on the right. Below this, the title 'BA Contacts' is followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' (highlighted in green) and 'Add a New Value'. A section titled 'Search Criteria' with a dropdown arrow contains a 'Search by:' dropdown menu set to 'Business Unit', followed by the text 'begins with' and an empty text input field (highlighted with a red border). Below this is a label 'Limit the number of results to (up to 300):' followed by a text input field containing '300'. At the bottom of the search criteria section are two buttons: 'Search' (highlighted in green) and 'Advanced Search' (a blue link). At the very bottom of the page, there are two blue links: 'Find an Existing Value' and 'Add a New Value'.

2. Enter the Business Unit number in the **Business Unit** field.

The **BA Contacts Search** page refreshes.



**BA Contacts**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

**Search Criteria**

Business Unit begins with

Group ID begins with

Limit the number of results to (up to 300):

[Basic Search](#) [Save Search Criteria](#)

**Search Results**

View All | 1-4 of 4

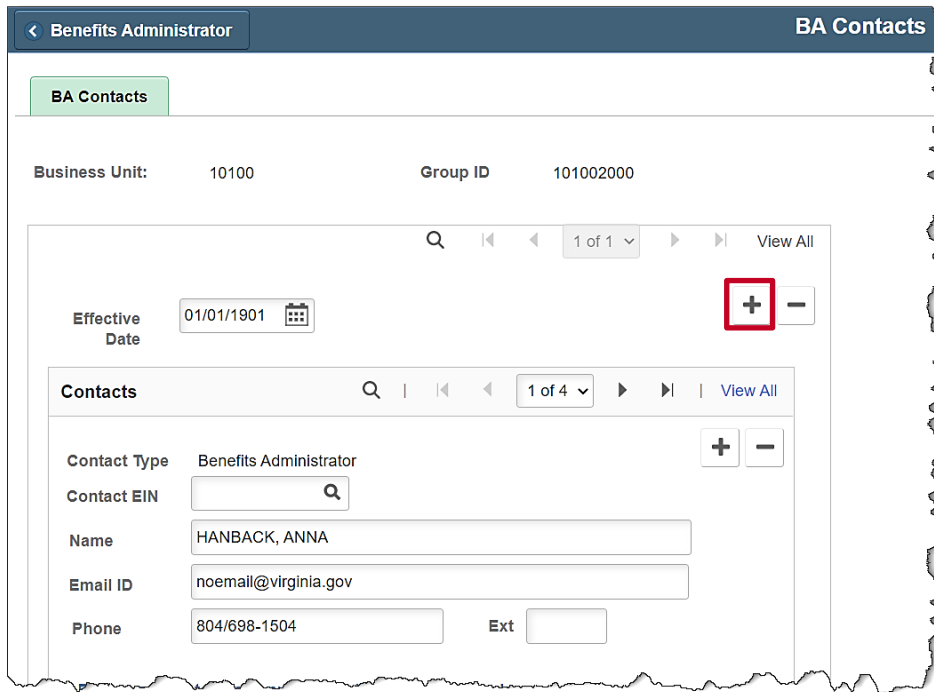
Business Unit	Group ID
<a href="#">10100</a>	<a href="#">101002000</a>
<a href="#">10100</a>	<a href="#">101003000</a>
<a href="#">10100</a>	<a href="#">101005000</a>
<a href="#">10100</a>	<a href="#">101102000</a>

[Find an Existing Value](#) | [Add a New Value](#)

- Click the corresponding **Group ID** link.

**Note:** Each **Group ID** must be updated individually.

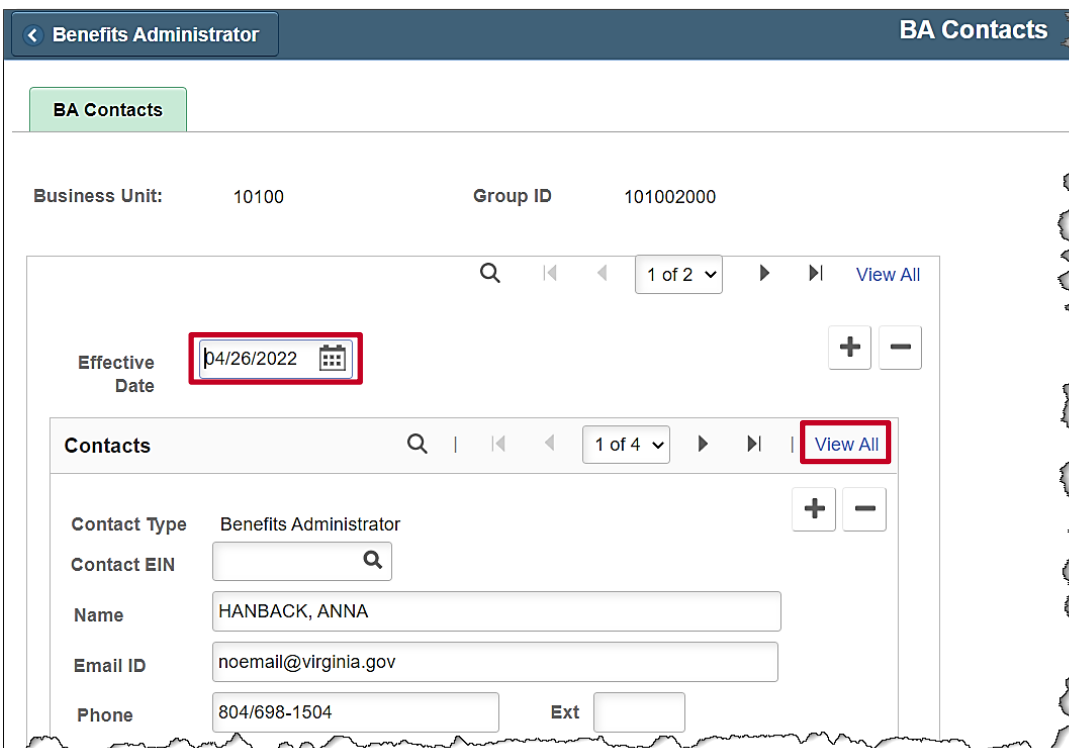
The **BA Contacts** page displays.



The screenshot shows the 'BA Contacts' page for Business Unit 10100 and Group ID 101002000. The 'Effective Date' is set to 01/01/1901. A red box highlights the '+' icon in the top right corner of the 'Effective Date' field, indicating where to click to add or edit contact information. Below the date field, the 'Contacts' section shows a search bar and a list of contacts. The first contact is 'HANBACK, ANNA' with email 'noemail@virginia.gov' and phone '804/698-1504'. A red box also highlights the '+' icon in the top right corner of the 'Contacts' section.

4. Click the **Add a Row (+)** icon to add or edit the contact information.

The **BA Contacts** page refreshes.

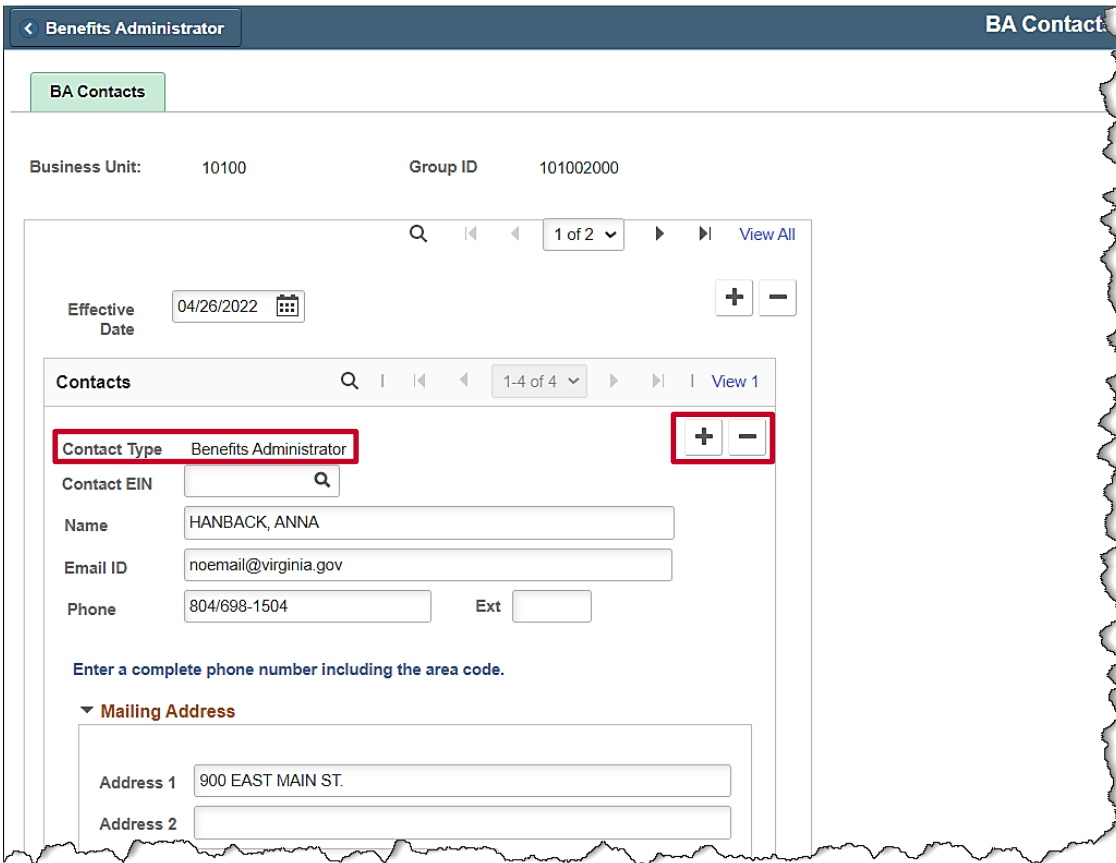


The screenshot shows the 'BA Contacts' page after refreshing. The 'Effective Date' is now 04/26/2022, which is highlighted with a red box. The 'Contacts' section shows the same contact information. A red box highlights the 'View All' link in the top right corner of the 'Contacts' section.

**Note:** The **Effective Date** defaults to the current system date.

5. Click the **View All** link.

The **BA Contacts** page refreshes.

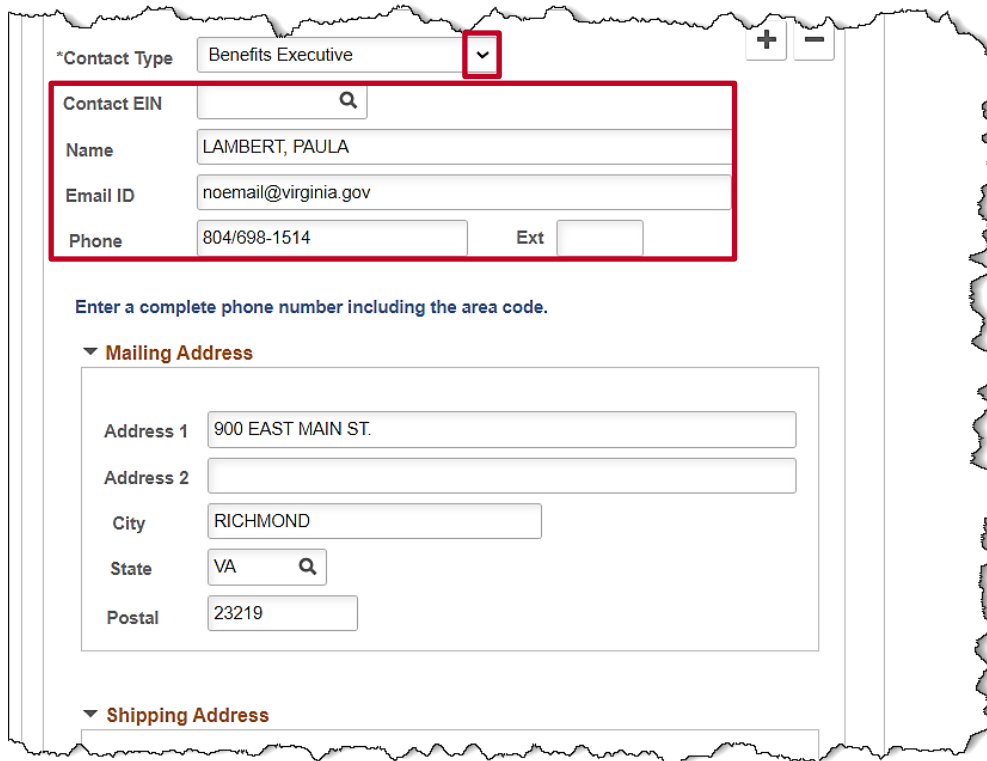


The screenshot shows the 'BA Contacts' page in a web application. At the top, there's a header with 'Benefits Administrator' and 'BA Contact'. Below this, a green tab labeled 'BA Contacts' is active. The page displays filters for 'Business Unit: 10100' and 'Group ID: 101002000'. A search bar and pagination controls (1 of 2) are visible. The 'Effective Date' is set to 04/26/2022. The main section, titled 'Contacts', shows a list with one entry: 'Contact Type: Benefits Administrator'. This entry is highlighted with a red box, and its '+ -' action icons are also boxed in red. Below the list, there are input fields for 'Contact EIN', 'Name' (HANBACK, ANNA), 'Email ID' (noemail@virginia.gov), and 'Phone' (804/698-1504). A note below the phone field says 'Enter a complete phone number including the area code.' Under a 'Mailing Address' section, there are fields for 'Address 1' (900 EAST MAIN ST.) and 'Address 2'.

6. Navigate to the **Contact Type** that requires an update and simply enter the updated information.

**Note:** If an additional contact type is needed, click the corresponding **Add a Row (+)** icon to add a new Contact Type.

The **BA Contacts** page refreshes.



\*Contact Type Benefits Executive ▼

Contact EIN

Name LAMBERT, PAULA

Email ID noemail@virginia.gov

Phone 804/698-1514 Ext

Enter a complete phone number including the area code.

▼ Mailing Address

Address 1 900 EAST MAIN ST.

Address 2

City RICHMOND

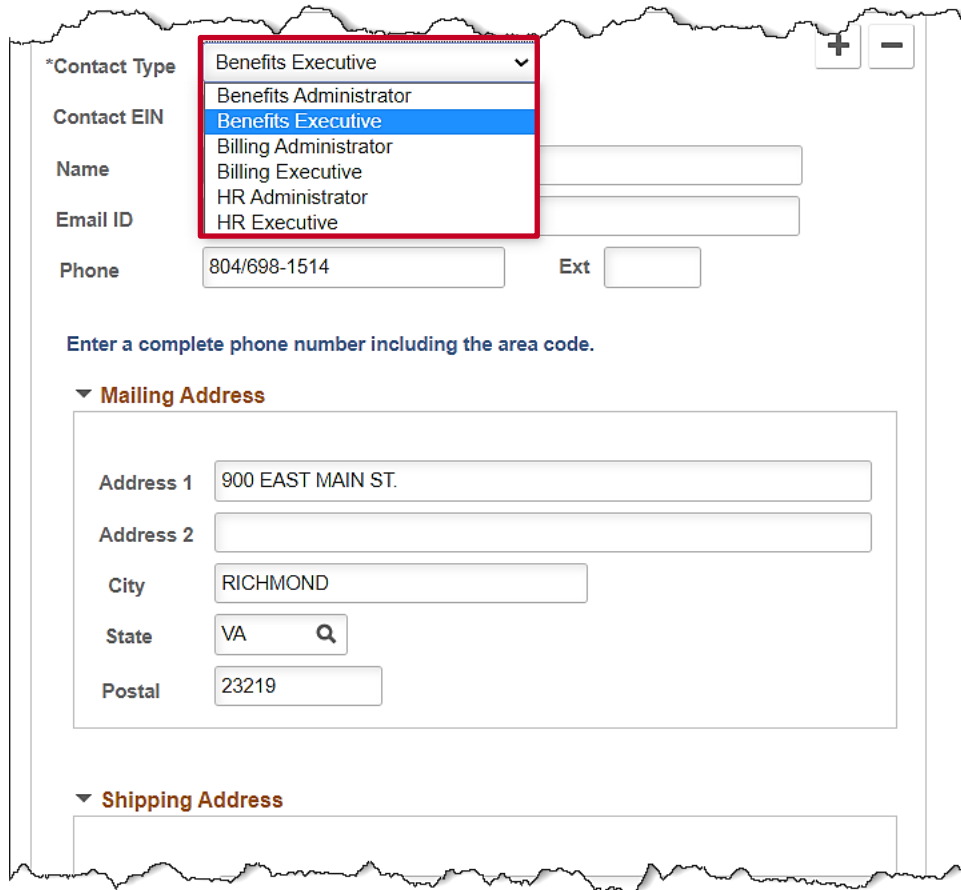
State VA

Postal 23219

▼ Shipping Address

7. Click the **Contact Type** dropdown button.

The **Contact Type** drop down menu displays.



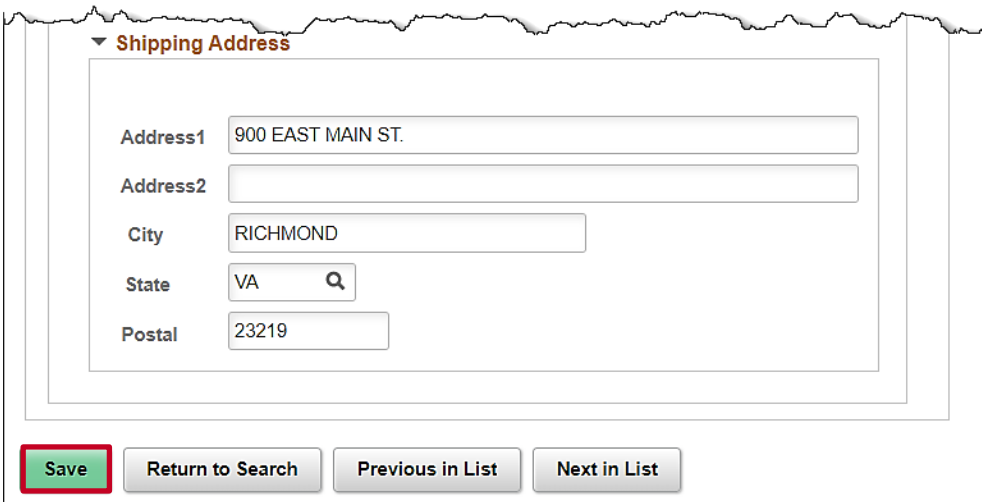
The screenshot shows a web form for adding or editing a contact. The **\*Contact Type** dropdown menu is open, displaying a list of contact types: Benefits Executive (selected), Benefits Administrator, Billing Administrator, Billing Executive, HR Administrator, and HR Executive. The form includes fields for Contact EIN, Name, Email ID, Phone (with an area code field), and Ext. Below these fields is a section for Mailing Address with fields for Address 1, Address 2, City, State (with a search icon), and Postal. A Shipping Address section is also visible at the bottom.

8. Select the applicable Contact Type by clicking the corresponding list item

**Note:** There are six types of contacts, and each Contact Type is limited to one contact. The Benefit Administrator, Benefit Executive, Billing Administrator, and Billing Executive contact details are reported to DHRM. The Benefits Administrator is the only required contact. The HR Administrator and HR Executive contacts are for informational purposes in Cardinal.

9. The BA can either enter the Name, Email ID, and Phone manually or enter the Contact EIN. If the Contact EIN is entered, the **Name**, **Email ID**, and **Phone** fields will automatically populate.

**Note:** If contact information is entered manually, any future updates to contact information will be manually maintained. If the Contact EIN is entered, Cardinal will automatically update the contact information when the individual's information is updated. The Email ID can be a shared email address if the Email ID is entered manually. The email address for the Contact Type of Benefits Administrator is used to receive notifications of dependent changes through Employee Self-Service (ESS).



The screenshot shows a web form titled "Shipping Address" with a dropdown arrow. The form contains the following fields:

- Address1: 900 EAST MAIN ST.
- Address2: (empty)
- City: RICHMOND
- State: VA (with a search icon)
- Postal: 23219

At the bottom of the form, there are four buttons: "Save" (highlighted with a red border), "Return to Search", "Previous in List", and "Next in List".

10. Click the **Save** button at the bottom of the page after entering all contact information.

**Note:** If the BA needs to update contact information for other Group IDs, click the **Return to Search** button and complete steps 3-10 of this Job Aid.